



INDIANA'S FORENSIC TREATMENT PROGRAM

DARMHA AND WITS USER MANUAL

JANUARY 2016 EDITION



SECTION 1: DARMHA ENROLLMENT.....	5
DARMHA Enrollment.....	6
SECTION 2: WITS ENTRY	14
Logging Into WITS	15
Home Screen	16
Client Search and Profile	17
Client Activity List and Creating an Episode	19
Creating a Local Vouche3r for Recovery Works Services	21
Encounters and Provider Billing	25
Closing a Voucher	28
SECTION 3: WITS ADMINISTRATIVE FUNCTIONS	29
Changing Credentials	30
Changing Security Questions	31
Reviewing all Vouchers for Your Agency	32
Agency Review of Claims	34
Claim Batching/Submissions/Adjudication	35
Reviewing Payments	37
Creating an Announcement	39
SECTION 4: GLOSSARY.....	40

DARMHA ENROLLMENT

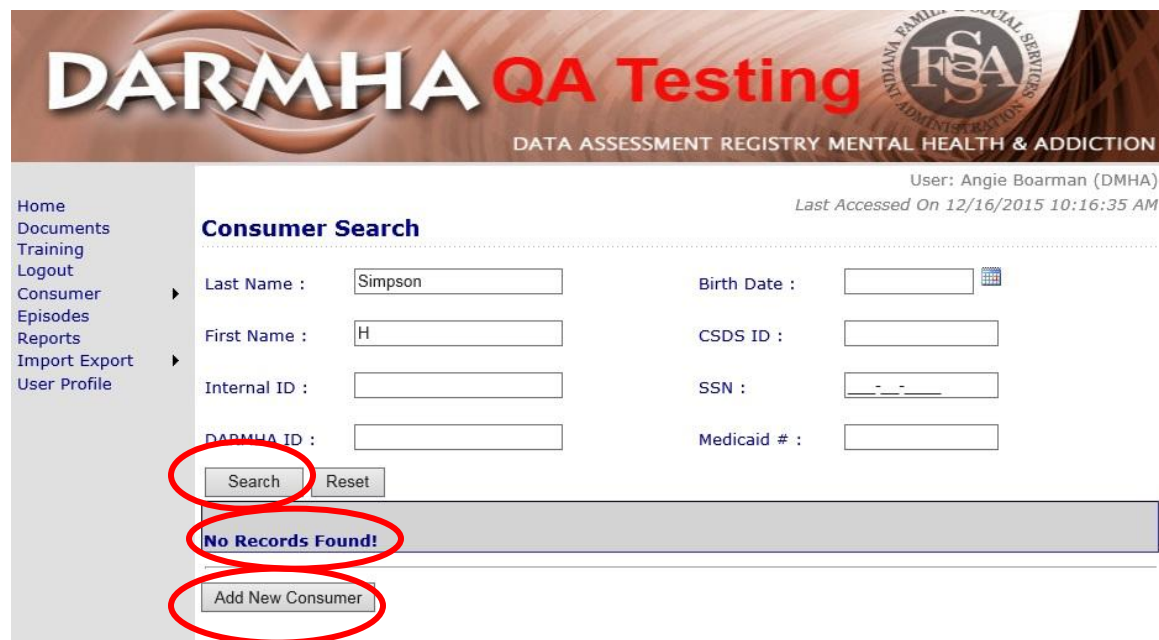


All Recovery Works participants MUST first be enrolled in DARMHA (Data Assessment Registry Mental Health and Addiction). Once a participant is enrolled in DARMHA, agencies may bill in WITS (Web Infrastructure for Treatment Services).

1. Go to the DARMHA website. The website address is: <https://dmha.fssa.in.gov/DARMHA>
2. Log in using your unique log in information. If you do not have a DARMHA log in, you will need to turn in a “DARMHA New User Form” to the Recovery Works Staff at Recover.Works@fssa.in.gov. The form can be found on at the Recovery Works website, www.RecoveryWorks.fssa.IN.gov. We will confirm that your agency is registered in DARMHA. If your agency is not in DAMRHA, we will work with you to get the “DARMHA Provider Registration Agreement Form” completed.



3. Search for the individual you would like to add. If there is “No Records Found,” click “Add New Consumer.” If they exist, move to Step Five.



4. Fill the Consumer page out and click “Insert.”

Documents

Training

Logout

Consumer

Episodes

Reports

Import Export

User Profile

For issues, questions or comments about the web application, contact the [Support Center](#).
darmha@fssa.in.gov
(317)-232-7925

DARMHA_QA
Version 4.5
Build 2.06
IP 10.19.156.11

Add Consumers

First Name:

Middle Name:

Mom's Maiden:

Gender: ☒ Male ☐ Female

Zip Code: *

Last Name:

Suffix:

Birth Date:

SSN:

Medicaid/HIP ID #:

Ethnicity:

Race (Choose all that apply) :

☐ African American or Black
People having origins in any of the Black racial groups of Africa.

☐ American Indian and Alaska Native
People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

☐ Asian
People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.

☒ Caucasian or White
People having origins in any of the original peoples of Europe, the Middle East, or North Africa.

☐ Native Hawaiian and Other Pacific Islander
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ Other Single Race
None of the other race categories apply.

CSDS ID:

Internal ID:

Insert

Cancel

5. Click "Create Episode."

Consumer View

First Name:	Homer	Last Name:	Simpson
Middle Name:		Suffix:	
Mom's Maiden:	Griffin	Birth Date:	5/12/1955
Gender:	<input checked="" type="radio"/> Male <input type="radio"/> Female	SSN:	123-02-1222
Zip Code:	46201	Medicaid/HIP ID #:	
Internal ID:		Ethnicity:	Not Hispanic/Latino
DARMHA ID:	1377435	Registration ID :	625048
CSDS ID:			

Race (Choose all that apply) :

- ☐ **African American or Black**
People having origins in any of the Black racial groups of Africa.
- ☐ **American Indian and Alaska Native**
People having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.
- ☐ **Asian**
People having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent.
- ☒ **Caucasian or White**
People having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- ☐ **Native Hawaiian and Other Pacific Islander**
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- ☐ **Other Single Race**
None of the other race categories apply.

Record was added on 12/16/2015 12:20:39 PM

[Edit Consumer](#) [Create Episode](#) [Add Assessment](#) [Remove Consumer](#) [Back To Search](#)

6. Fill the Episode page out and click "Insert."


User: Angie Boorman (DMHA)
Last Accessed On 12/16/2015 10:16:35 AM



Episode View - Simpson, Homer










Episode Assessment Encounter NOMS EBP Diagnosis/Agreement


Building New Episode:

Internal Episode Code: 05121955

Episode Start Date: 12/16/2015  Episode Status: Consumer in Treatment 

Episode End Date:  DSC Status: DMHA Supported Consumer 

Marital Status:	Married-living Together 	Insurance:	None 
County:	Marion 	Military Service :	No 
Disability:	None Known 	Veteran :	No 
Referral Source:	Court/Criminal Justice 	Deployed :	No 
Legal Basis:	Probation/Parole 	Combat :	No 
Family Size:	5	Family Member in Military :	No 
Family Income:	50500	Medicaid/HIP Active?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Prior Substance Abuse Episodes:	2	SNAP/Food Stamps?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Dependent Children?	<input checked="" type="radio"/> Yes <input type="radio"/> No	TANF?	<input type="radio"/> Yes <input checked="" type="radio"/> No


 

7. Click the tab, NOMS, and click "New."

Use
Last Accessed On

NOMS View - Simpson, Homer

Episode Assessment Encounter **NOMS** EBP Diagnosis/Agreement



8. Fill out the NOMS (National Outcome Measurement System) page and click "Insert." For more information on how to fill out the NOMS, visit the "Documents" Sections of DARMHA.

User: Angie Boarman (DMHA)

Last Accessed On 12/16/2015 10:16:35 AM

NOMS View - Simpson, Homer

Episode	Assessment	Encounter	NOMS	EBP	Diagnosis/Agreement
NOMS Date: 12/16/2015					
NOMS Reason: <input checked="" type="radio"/> Initial <input type="radio"/> Re-Assessment <input type="radio"/> Discharge Limit 1 Initial and Discharge per episode					
Employment: Unemployed, Looking For Work					
Employment Detail: Not Applicable					
Supported Employment: Not enrolled in or not receiving supported employment services					
Living Arrangement: Independent Living		Criminal Involvement: 1			
ROLES: Not Applicable		Social Support: No attendance in the past mo			
Needle Use: No, Consumer has not used a n		Housing Category: Permanent Housing			
Education Level : High School Graduate		Housing Stability : More than 2 years			
School Attendance Status : Not applicable (use for infants a		Supported Housing? <input type="radio"/> Yes <input checked="" type="radio"/> No			
Currently Pregnant? <input type="radio"/> Yes <input type="radio"/> No					
Level of Residential Support					
<input checked="" type="radio"/> Residential Support not needed or not Provided-consumer lives alone or with others of his/her own choosing (such as spouse, family, friends)					
<input type="radio"/> Living with person(s) who provide supportive services in the home that are needed by the consumer in order to maintain the living situation. (Services may include housekeeping, meals, companionship and may include family and friends)					
<input type="radio"/> Access to paid support in the consumer's residence as needed					
<input type="radio"/> Access to paid support in the consumer's residence 5 or more days per week for up to 8 hours					
<input type="radio"/> Access to paid support in the consumer's residence 5 or more days per week for 9 to 16 hours					
<input type="radio"/> Access to paid support in the consumer's residence 24 hours a day, 7 days per week					
Level of Community Integration					
<input checked="" type="radio"/> Living environment is fully integrated in the community					
<input type="radio"/> Living environment is home to persons with mental health/addiction issues, persons with other disabilities, and persons without identified disabilities					
<input type="radio"/> Living environment is home to persons with mental health/addiction issues only					
Primary Substance		Secondary Substance		Tertiary Substance	
Alcohol		Not Applicable		Not Applicable	
Route: Oral		Route: Not Applicable		Route: Not Applicable	
Frequency: Daily		Frequency: Not Applicable		Frequency: Not Applicable	
Age First Use: 12		Age First Use:		Age First Use:	
Insert Cancel					

9. Click the "Diagnosis/Agreement" tab, and click "New."

Use
Last Accessed On

Diagnosis & Agreement Type View - Simpson, Homer

Episode Assessment Encounter NOMS EBP **Diagnosis/Agreement**

New

10. Fill out the Diagnosis/Agreement and click "Insert." Providers can use DSM 5 or ICD-10 code to complete the Diagnosis fields. A complete list of codes can be found on the DARMHA "Documents" page.

Last Accessed On 12/16/2015 10:16:35 AM

Diagnosis & Agreement Type View - Simpson, Homer

Episode Assessment Encounter NOMS EBP **Diagnosis/Agreement**

Diagnosis/Agreement Date : 12/16/2015

Primary Diagnosis 1: F10.20

Diagnosis 2:

Diagnosis 3:

Diagnosis 4:

Diagnosis 5:

SOGS:

Health Conditions:

1. Diabetes?	<input checked="" type="radio"/> No <input type="radio"/> Yes
2. Cardiovascular Disease?	<input checked="" type="radio"/> No <input type="radio"/> Yes
3. Hypertension (High Blood Pressure)?	<input checked="" type="radio"/> No <input type="radio"/> Yes
4. Hyperlipidemia (High Cholesterol)?	<input checked="" type="radio"/> No <input type="radio"/> Yes
5. Cancer?	<input checked="" type="radio"/> No <input type="radio"/> Yes
6. Smoking?	<input checked="" type="radio"/> No <input type="radio"/> Yes
7. Obesity?	<input checked="" type="radio"/> No <input type="radio"/> Yes
8. Asthma?	<input checked="" type="radio"/> No <input type="radio"/> Yes
9. COPD (Chronic Obstructive Pulmonary Disease)?	<input checked="" type="radio"/> No <input type="radio"/> Yes

Agreement Type

☐ SMI

☐ SED

☒ CA

Specialized Treatment

☒ None

☐ Deaf Services

☐ Opioid Treatment

☐ Gambling Treatment

Agreement Change

☒ Initial

☐ Refined Diagnosis

☐ Special Funding

Insert **Cancel**

11. Go to the Consumer - View (on left side menu).

User: Angie Boorman (DMHA)
Last Accessed On 12/16/2015 11:53:10 AM

Diagnosis & Agreement Type View - Simpson, Homer

- Home
- Documents
- Training
- Logout
- Consumer**
- Episodes
- Reports
- Import Export
- User Profile

Episode
Assessment
Encounter
NOMS
EBP
Diagnosis/Agreement

Agreement Date	Diagnosis 1	Diagnosis 2	Diagnosis 3	Agreement Type	Specialized Treatment	Agreement Change
2015	F10.20			CA	None	Initial

Diagnosis/Agreement Date : 12/16/2015

Primary Diagnosis 1:

Diagnosis 2:

Diagnosis 3:

Diagnosis 4:

Diagnosis 5:

SOGS:

Health Conditions:

ID : 1547851

Agreement Type

☐ SMI

☐ SED

☒ CA

Specialized Treatment

☒ None

☐ Deaf Services

☐ Opioid Treatment

☐ Gambling Treatment

Agreement Change

Click "Edit Consumer."

User: Angie Boorman (DMHA)
Last Accessed On 12/16/2015 11:53:10 AM

Consumer View

First Name: Homer	Last Name: Simpson
Middle Name:	Suffix:
Mom's Maiden: Griffin	Birth Date: 5/12/1955
Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female	SSN: 123-02-1222
Zip Code: 46201	Medicaid/HIP ID #:
Internal ID:	Ethnicity: Not Hispanic/Latino
DARMHA ID: 1377435	Registration ID : 625048
CSDS ID:	

Race (Choose all that apply) :

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People having origins in any of the Black racial groups of Africa.
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- ☒ **Caucasian or White**
People having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- ☐ **Native Hawaiian and Other Pacific Islander**
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- ☐ **Other Single Race**
None of the other race categories apply.

Record was added on 12/16/2015 12:20:39 PM

Edit Consumer
Create Episode
Add Assessment
Remove Consumer
Back To Search

Click the “Recovery Works Consumer” check box. Once the box is checked, DOC ID will show up, add the DOC ID if appropriate. And “Submit to WITS”.

☐ **Native Hawaiian and Other Pacific Islander**
People having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

☐ **Other Single Race**
None of the other race categories apply.

CSDS ID: Internal ID:

☒ **Recovery Works Consumer**

Please submit your consumer record to WITS and click Submit button below.

DOC ID #: **Submit to WITS**

Once you’ve submitted the participant to WITS, you will then see a message with the WITS unique client number (UCD).

None of the other race categories apply.

☒ **Recovery Works Consumer**

Consumer data has been successfully submitted to WITS (ID:M529522IS215110).

DOC ID #:

Record last modified on 12/16/2015 1:11:13 PM

Make note of the participant’s UCN, as you will need it for the next steps.

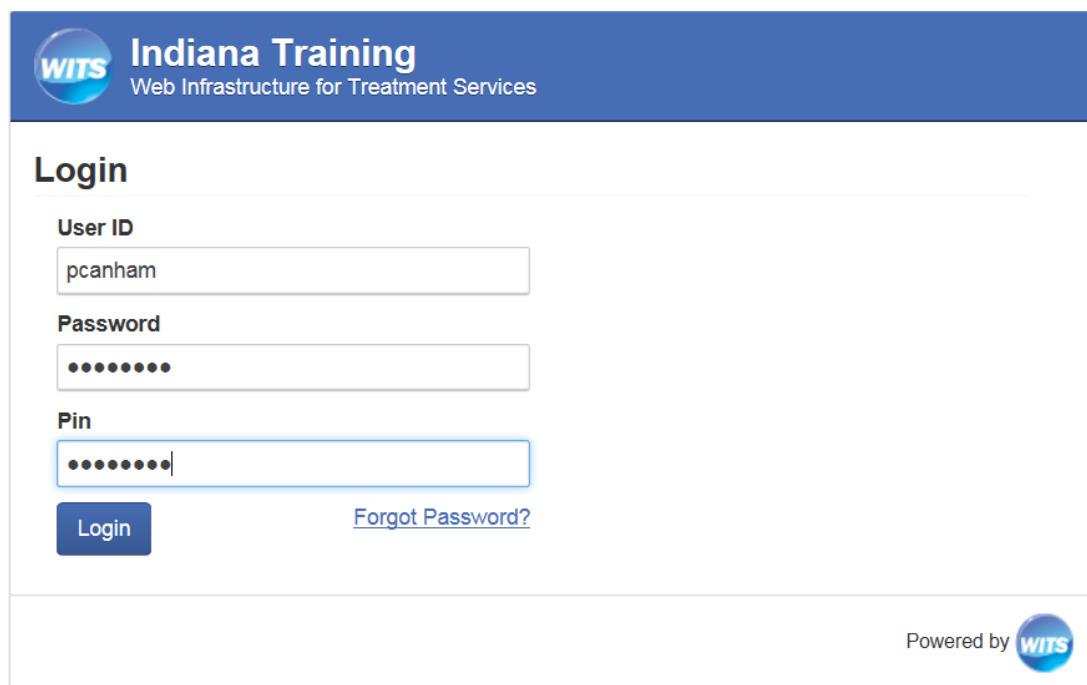
WITS ENTRY



Once you clicked “Submit to WITS” in DARMHA, the State of Indiana’s Web service began transferring the participant’s information over to WITS. This saves you, as the provider, from the need to enter the same information in both systems. We will begin with logging in to WITS.

Logging In To WITS

1. Go to the WITS website. The website address is: <https://dmha.fssa.in.gov/atr>
2. Log in using your unique log in information. If you do not have a WITS log in, you will need to turn in a “WITS New User Form” to the Recovery Works Staff at Recover.Works@fssa.in.gov. The form can be found on at the Recovery Works website, www.RecoveryWorks.fssa.IN.gov. We will confirm that your agency is registered in WITS. If your agency is not in WITS, we will work with you to get you set up.



WITS Indiana Training
Web Infrastructure for Treatment Services

Login

User ID

Password

Pin

[Forgot Password?](#)

Powered by **WITS**

Tip: If this is your first time logging into WITS or if your credentials (i.e. Password and Pin) are expired, the system will show the Reset Credential screen to allow you to enter your Password and Pin and to set your security question. Be sure to pick a Password and Pin that can be easily memorized and which is secure. As part of the system security features, you may be asked to change your Password/Pin every few months. Also, if you enter the wrong Password / Pin multiple times your account may be disabled. Contact your WITS administrator if that occurs.

Home Screen

The Home screen is typically the first screen that most providers see when they log into WITS. It provides general information such as announcements, alerts or updates in schedule.

1. The announcement section will have helpful information from the State of Indiana or from agency administrators. Hover your cursor over the pencil icon to click on the **Review** link.
2. Alert List and Scheduler are not being utilized for the Forensic Treatment \ Recovery Works! Process at this time.
3. Providers will use the left navigation to view clients, create encounters and bill for those encounters.

The screenshot shows the WITS Indiana Training Home Screen. At the top, the header includes the WITS logo, 'Indiana Training', and a 'Logout' button. Below the header, a navigation bar shows the user 'Canham, Patty' and the location 'FTRW Agency, Facility 01'. A client selection bar shows 'Client: Dancer, Native | M619577AD738100 | 1' and a 'Clear Client' button. On the left, a navigation menu (annotated with a blue circle and the number 3) lists: Home Page, Agency, Client List, System Administration, Reports, and Support Ticket. The main content area is titled 'Home' and contains three sections: 1. 'Announcements' (annotated with a blue circle and the number 1): A table with columns 'Posted Date', 'Start Date', and 'Priority'. It contains one announcement: 'Send questions on the Forensic Treatment \ Recovery Works process to Shannon Burnett' posted on 11/25/2015 at 10:20 AM with priority 'H'. A pencil icon next to the announcement is highlighted with a black box labeled 'Review'. 2. 'Alert List': A table with columns 'Actions', 'Alert Type', 'Client Name: ID', 'Applies To Staff', 'Message', 'Facility', and 'Date Due'. It is currently empty. 3. 'Schedule for': A section with 'Start Date' (11/25/2015) and 'End Date' (empty) fields, a 'Refresh' button, and a 'Search Calendar' link. Below these fields is a table with columns 'Actions', 'Start', 'End', 'Summary', and 'Status', which is also empty. A red arrow (annotated with a blue circle and the number 2) points from the 'Review' button in the Announcements section to a detailed view of the announcement. This detailed view shows the 'Summary' (the announcement text) and 'Details' (a larger text area). At the bottom of this view, it shows 'Created By: Canham, Patty' and 'Start Date: 11/25/2015', with a red 'Cancel' button to the right.

Client Search and Profile

Overview: The WITS process always starts with the client you are treating. This section walks you through ways to locate your client and to review the information that was automatically created in WITS from the information you entered in DARMHA

1. To search for a client, click on the **Client List** link in the left navigation menu. A blank **Client List** screen will appear. WITS will search on any fields you fill in, once you click on the **Go** button. The more fields you enter, the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible.
 - You can also enter a partial name (or other field) followed by a “*”. This is called a wild card search. For instance, if you search for Last Name of “Smit*”, you will get people with the last name of “Smith”, “Smitty”, “Smithson”, etc.
 - For date fields – you can use conditional searches such as >01/01/1990. If you key this into the DOB field, it will return clients with a DOB greater than 01/01/1990.
2. Look for your client in the Client List. If you find the right person, pull up the profile by hovering your cursor over the Actions pencil icon and clicking on **Profile** link next to their name. The Unique Client # (UCN) should match the value that is stored in DARMHA.
3. If you do not find your client either by name, another identifier, or the UCN that appeared in DARMHA – please contact your WITS administrator.

[Home Page](#)
1 [Client List](#)
▶ [Client Profile](#)
[Linked Consents](#)
▶ [Activity List](#)
[Episode List](#)
▶ [System Administration](#)
[Reports](#)
[Support Ticket](#)

Client Search

Agency FTRW Agency

Facility

First Name

Last Name

SSN

DOB

Indiana Training Client Id

Unique Client Number

Provider Client ID

Treatment Staff

Primary Care Staff

Case Status All Clients

Intake Staff

Other Number

Number Type

Include Only Active Consents Yes

Clear


Go



Client List (Export)

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	M5290331B326100	Biscuit, Sea	5/2/1960	111-22-2333	Male
	M619577AD738100	Dancer, Native	6/1/1985	999-33-3777	Male
			8/30/1981	444-66-6777	Female

[Profile](#) | [Activity List](#) | [Linked Consents](#)

1. The Profile information was created from information that you initially entered into DARMHA.
2. The **Record Created By** field will have the value “Web Provider, DARMHA”. This indicates that the Client Profile was generated from DARMHA information
3. Click the Cancel or Finish button to exit this screen

Location: RW - They got out, They got out 

 **Client:** [REDACTED] | M819208AB808100  Clear Client

Profile

First Name

Middle Name

Last Name

Mother's Maiden Name

Suffix

Gender

DOB

SSN

Driver's License

Medicaid #

Has paper file

DARMHA Client ID

Unique Client Number

State Client ID

Record Created By

Last Updated By

Created Date

Last Updated Date

[Residence Zip Code](#)

[REDACTED]

[REDACTED]

[REDACTED]

Male

8/1/1982

310-90-0088

132792

M819208AB808100

Web Provider, DARMHA

Web Provider, DARMHA

12/7/2015 10:21 AM

12/7/2015 10:21 AM

47404

Administrative Actions

Cancel

Save

Finish



Client Activity List and Creating an Episode

The Client Activity List provides an overview to the entire client's profile, episode (intake), encounter and program enrollment information.

1. After entering your information to DARMHA – the screen below represents what you will initially see in the activity list in WITS. This list will grow as you create the episodes and associated encounters.
2. Once you have selected your client from the Client list – hover your cursor over the pencil icon or Click on Client List > Activity List from the left navigation to get to this screen.
3. To create an episode for your client, click on the Start New Episode link.
4. You will be presented with the Intake Case Information screen. You will need to complete the following fields, the other required fields are pre-filled by the system:
 - Initial Contact: Select the value “By Appointment”
 - Residence: Select the county of residences for the client
 - Intake Date: Will be pre-filled with the current date – select the date that is valid for start of care.
5. Click on the **Save** or **Finish** buttons to save your changes

The screenshot displays the WITS interface for creating a new episode. It includes a left navigation menu, a client header, an episode list table, and an intake case information form. Numbered callouts highlight key elements: 1 points to the 'Start New Episode' link in the episode list; 2 points to the 'Activity List' link in the navigation menu; 3 points to the 'Start New Episode' link in the episode list; 4 points to the 'Intake Case Information' form; and 5 points to the 'Save' and 'Finish' buttons at the bottom.

Client: Pharoah, American | M619044HP448100 **Clear Client**

Please select **1** Click Start New Episode.

Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE	Domain

2 **3** **Start New Episode**

4 **Intake Case Information**

Client: Pharoah, American | M619044HP448100 | 1 **Clear Client**

Intake Facility: Facility 01 Case #: 1
Intake Staff: Canham, Patty Case Status: Open Active
Initial Contact: By Appointment Initial Contact Date:
Residence: Brown Intake Date: 11/15/2015
Source of Referral: Criminal Justice Provider Pregnant: No
Prenatal Treatment:
HIV Positive:
Problem Area:
The client has been given a list of providers to choose from? Yes

Domains: Selected Domains: Forensic
Date Closed:

5 **Cancel Save Finish**

6. Click Finish to return to the Client Activity List.
7. Please note that you can now view the entry for the Episode (Intake Transaction) that you just created. You will also see the Client Program Enrollment (Recovery Works) that was automatically created by the system when you saved the Episode (Intake Transaction).

User: Canham, Patty | Location: FTRW Agency, Facility 01 | Snapshot

Client: Pharoah, American | M619044HP448100 | 1 | Clear Client

Home Page

Agency

Client List

Client Profile

Linked Consents

Activity List

Intake

Client Activity List

Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	11/15/2015	12/9/2015	Completed
	Client Program Enrollment (Recovery Works)	7/1/2015	12/9/2015	Completed
	Intake Transaction	11/15/2015	12/9/2015	Completed

Note: The terms "Episode" and "Intake" are used interchangeably in WITS.

Business rules to be aware of:

- Client must be enrolled in a Client Program in order to set up vouchers and create encounters. The good news is the system will do this automatically when you create the Episode (Intake).
- The purpose of the Client Program enrollment is to indicate that the client is enrolled in a program to receive services.
- At the time you create and save the Episode (Intake Transaction) the system will also automatically create the Client Group Enrollment (see below).
- The Client Group Enrollment (CGE) defines the payor for the Forensic Treatment / Recovery Works services. This needs to be in place in order to release an encounter to billing. As the payor will always be the State of Indiana, had the ability to automatically create the CGE (means less keying for providers).

Client: Pharoah, American | M619044HP448100 | Clear Client

Home Page

Agency

Client List

Client Profile

Alternate Names

Additional Information

Contact Info

Collateral Contacts

Other Numbers

History

Client Group Enrollment

Voucher

Payor List

[Add Benefit Plan Enrollment](#) [Add Government Contract Enrollment](#)

Actions	Priority	Plan	Group	Contract	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date
		Recovery Works	Recovery Works	FTRW Agency	M619044HP448100		7/1/2015	

Creating a Local Voucher for Recovery Works Services

From the above Client Activity List – hover your cursor over the Pencil icon next to the Client Profile and click on the **Review** link. You will be presented with the Client Profile screen and left navigation menu items.

1. Click on Client Profile > Voucher link from the left navigation.
2. You will be presented with the Voucher List screen. Click on the Add New Voucher Record link

User: Coordinator, Casey | Location: FTRW Agency, Facility 01

Client: Dancer, Native | M619577AD738100 | 1 Clear Client

1

- Home Page
- Agency
- Client List
 - Client Profile
 - Alternate Names
 - Additional Information
 - Contact Info
 - Collateral Contacts
 - Other Numbers
 - History
 - Client Group Enrollment
 - Voucher**
 - Allergies
 - Linked Consents
 - Activity List
 - Episode List

2

Profile

First Name: Native

Middle Name:

Last Name: Dancer

Mother's Maiden Name:

Suffix:

Gender: Male

DOB: 6/1/1985

SSN: 999-33-3777

Driver's License:

Medicaid #:

DARMHA Client ID: 123456

Unique Client Number: M619577AD738100

State Client ID:

Record Created By: Canham, Patty

Last Updated By: Canham, Patty

Created Date: 11/24/2015 5:50 PM

Last Updated Date: 11/24/2015 5:50 PM

Residence Zip Code: 44444

Voucher List

Add New Voucher Record

Actions	Auth #	Payor	Status	Effective Date	End Date	Authorized	Encumbered	Expended	Available	Last Activity Date
---------	--------	-------	--------	----------------	----------	------------	------------	----------	-----------	--------------------

You will be presented with the Voucher screen, with the Vouched Services list.

User: Coordinator, Casey | Location: FTRW Agency, Facility 01 Snapshot

Client: Dancer, Native | M619577AD738100 | 1 Clear Client

Home Page

Agency

Client List

- Client Profile
 - Alternate Names
 - Additional Information
 - Contact Info
 - Collateral Contacts
 - Other Numbers
 - History
 - Client Group Enrollment
 - Voucher**
 - Allergies
 - Linked Consents
- Activity List
- Episode List

- System Administration

Voucher

Group Enrollment: Recovery Works

Plan: Recovery Works

Voucher:

Administering Agency: FTRW Agency

Effective Date: 11/25/2015

End Date: 12/25/2015

Comments:

Status: Active

Agreement: 10667 - FTRW Agency / 7/1/2015 - 6/30/2016 - Recovery Works-Recovery Works

Date Approved: 11/25/2015

Updated Date:

Updated By:

Vouched Services List

Add Service

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
---------	---------	------------------	-------------------	------------	----------	-----------------

Total Vouched: 0.0

Total Encumbered: 0.0

Total Expended: 0.0

Total Available: 0.0

Cancel Save Finish

DARMHA & WITS MANUAL

20 | PAGE

A number of the Voucher required fields are pre-populated for you.

1. The **Agreement** field outlines the dates that can be set on the voucher/authorization.
 - These dates typically represent the State Fiscal Year time period.
 - There may be more than one agreement in place at a time – representing multiple State Fiscal years, click on the down arrow to see multiple values.
 - If you have services that span these time periods – will need to set up separate vouchers.
2. The **Effective Date** and **End Date** represent the date range specific to this voucher.
 - Effective Date defaults to the current date.
 - And the End Date defaults to the current date plus 30 days.
 - You may modify these to be consistent with the date range you expect the services to occur.
 - The End Date can be no more than 30 days after the Effective Date.
3. As you add services to the Voucher, the **Voucher Services** list will populate with that information and the system will calculate totals for the vouched services.
4. Click the Save button and then the **Add Service** link to add Services to this voucher

User: Coordinator, Casey | Location: FTRW Agency, Facility 01 | Snapshot

Client: Dancer, Native | M619577AD738100 | 1 | Clear Client

Home Page

Agency

Client List

Client Profile

Alternate Names

Additional Information

Contact Info

Collateral Contacts

Other Numbers

History

Client Group Enrollment

Voucher

Allergies

Linked Consents

Activity List

Episode List

System Administration

Voucher

Group Enrollment: Recovery Works | Status: Active

Plan: Recovery Works | Agreement: 10667 - FTRW Agency | 7/1/2015 - 6/30/2016 | Recovery Works-Recovery Works

Voucher: | Date Approved: 11/25/2015

Administering Agency: FTRW Agency | Updated Date: | Updated By:

Effective Date: 11/25/2015 | End Date: 12/25/2015

Actions

Vouched Services List

Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units

Total Vouched: 0.0

Total Encumbered: 0.0

Total Expended: 0.0

Total Available: 0.0

Cancel Save Finish

5. The **Vouched** service screen allows you to enter the service and # Vouched Units.
6. Click on the **Service** down arrow to select the service. If you don't see a service you need – contact your WITS Administrator.
7. Enter the appropriate number of units in the **# Vouched Units** field.
8. Click **Save** or **Finish** button when complete.
9. You will be returned to the **Voucher List** screen which has been updated with the information you entered.

Client: Dancer, Native | M619577AD738100 | 1 Clear Client

5 Vouched

Service **Doing Stuff here** **6**

Voucher # 567

7 # Vouched Units **4**

Used Units 0

Vouched Amount \$20.00

Cancel Save **8** Finish

10. Note that a number of fields are now grayed out and can no longer be update – also the status of the Voucher is 'Active'.
11. The service you authorized now appears in the Vouched Services List and the calculated fields have been updated.
12. You can keep adding services or click on the Finish button to exit this screen.

Client: Dancer, Native | M619577AD738100 | 1 Clear Client

9 Voucher **10**

Group Enrollment Recovery Works Status Active

Plan Recovery Works Agreement 10667 - FTRW Agency / 7/1/2015 - 6/30/2016 - Recovery Works-Recovery Works

Voucher 567 Date Approved 11/25/2015

Administering Agency FTRW Agency Updated Date 11/25/2015 7:50 AM

Effective Date 11/25/2015 Updated By Coordinator, Casey

End Date 12/25/2015

Comments

12

Vouched Services List Add Service						
Actions	Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available Units
	Doing Stuff here	4	\$20.00	\$0.00	\$0.00	4.00
11						

Actions Close

Total Vouched: \$20.00

Total Encumbered: \$0.00

Total Expended: \$0.00

Total Available: \$20.00

Cancel Save **12** Finish

Voucher Calculated Field Definitions:

- **Total Vouched:** Represents the total money amount has been authorized for this voucher.
- **Total Encumbered:** Represents authorized services where the associated encounter has been released to billing.
- **Total Expended:** Represents authorized services where the associated encounter has been paid (e.g. associated monies have been expended).
- **Total Available:** Represents monies remaining on the voucher that are available for encounters. It is calculated by subtracting Total Encumbered and Total Expended from the Total Vouched amount.

Encounters and Provider Billing

To Create Encounters for a Client

1. From the **Client List** screen (menu item on left Navigation), select the client you are working with and click on the corresponding **Activity List** link (click on **Actions** pencil icon)
2. In the Client Activity List screen, search to see if encounter has been entered. You can click on the Review link (with Actions pencil icon) to see encounter details.
3. From the main navigation menu on the left, click on **Activity List > Encounters**, you will be presented with the **Encounter Search** and **Encounter List** screens.

The screenshot illustrates the process of creating encounters for a client through a web application. It is divided into three numbered steps:

Step 1: The user is on the 'Client List' screen. The left navigation menu shows 'Client List' selected. The main area displays a 'Client Search' form and a table of clients. The client 'Dancer, Native' is highlighted, and the 'Activity List' link in the 'Actions' column is clicked.

Step 2: The user is on the 'Client Activity List' screen. The left navigation menu shows 'Activity List' selected. The main area displays a table of activities. The 'Intake Transaction' activity is highlighted, and the 'Encounters' link in the 'Actions' column is clicked.

Step 3: The user is on the 'Encounter Search' screen. The left navigation menu shows 'Encounter Search' selected. The main area displays a form to search for encounters.

4. From the **Encounter List** screen, click on the **Add Encounter** link to create a new Encounter for the client. Proceed to complete the required fields including:
 - a. **Service** – Service you are rendering to the client
 - b. **Program Name** – This is pre-filled.
 - c. **Service Location** – Select appropriate County (where service occurred) value from the drop down menu.
 - d. **Start date** – The date the encounter is rendered as well as the number of units provided
 - e. **Start Time \ End Time** – The start and end times of the rendered service. Entering this information will cause the system to calculate the **Duration**.
 - f. **# of Service Units/Session** – This is limited by the units in the corresponding voucher for this client.
5. **Notes** field is to be completed when you are documenting an encounter that was done by an agency you contracted with to do services not available in your agency.

Client: Dancer, Native | M619577AD738100 | 1 [Clear Client](#)

No results match your search criteria.

Encounter Search

Start Date: 11/25/2014 End Date: 11/25/2015
 Rendering Staff: Service:
 Encounter Status: Program:
 Allow Disclosure of Note:

[Clear](#) [Go](#)

Encounter List [\(Export\)](#) [Add Encounter](#)

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status
Encounter						
	ENC ID 155	Created Date 11/25/2015 9:25 AM				
	Service Doing Stuff here					
	Program Name Facility 01/Recovery Works : 7/1/2015 -					
	Service Location Bartholomew	Start Date 11/25/2015	End Date	Start Time 9:00 AM	End Time 10:00 AM	
		Duration 60 Min		# of Service Units/Sessions 1		
	Rendering Staff Coordinator, Casey					
<div>5</div> <div>7</div> <div>6</div>						
Administrative Actions Release to Billing Delete						
Cancel Save Finish						

Note: The service dropdown list only shows services that belong to active vouchers within the current episode. No encounter can be created for services in a closed voucher.

You may not be able to release an encounter to billing if the number of units in the encounter is greater than the voucher available amount, or if you exceed the available yearly cap.

6. Press the **Save** button after entering the encounter
7. If you have the Release to Billing role and the encounter is ready to be billed, you will see the **Release to Billing** link in the Administrative actions. Click on that link to release the encounter to billing.
8. Notice that the encounter you have just created appears in the list, and its status is **Released**. To see the details of the encounter simply click on the Actions pencil icon next to the encounter.
 - For encounters that have not been released to billing, you can review, delete or release to billing. You would use the delete to erase an unbilled encounter that had been created by mistake. Delete and Release to Billing functions are available only to staff that have been set up with the appropriate role.
 - For encounters that have been released to billing, you can review.

 **Client:** Dancer, Native | M619577AD738100 | 1  Clear Client

 This encounter has been released and should not be edited. 



Encounter Search

Start Date	<input type="text" value="11/25/2014"/>	End Date	<input type="text" value="11/25/2015"/>
Rendering Staff	<input type="text"/>	Service	<input type="text"/>
Encounter Status	<input type="text"/>	Program	<input type="text"/>
Allow Disclosure of Note	<input type="text"/>		

Clear **Go**

Encounter List [\(Export\)](#)

[Add Encounter](#)

Actions	Svc Date	Service	ENC ID	Rendering Staff	Program Name	Status
	11/25/2015	Doing Stuff here	155	Coordinator, Casey	Recovery Works	Released
						

8

Closing a Voucher

WITS does have a process to automatically close a voucher. Providers should do this when services have been completed so that any monies that have not been used are returned to the general Recovery Works fund for use for other clients. We ask that prior to opening a new Voucher, you close out previous vouchers.

1. Need to be in the context of the client whose voucher needs to be closed. From the left navigation, client on Client List > Client Profile > Voucher.
2. From the Voucher List screen – select the Voucher to be closed.
3. Notice that prior to closing this voucher - \$900 had been authorized but only \$750 had been expended when the provider determined that all services were complete.
4. Click on the Close link in the Administrative Actions section
5. You will receive a prompt asking if you are sure you want to close the voucher. Click on the Yes button
6. The screen will reload with the updated closed voucher.
7. The Status has been changed to Close
8. The Authorized amount has been changed to \$750 which matches the \$750 expended. The additional \$150 has been returned to the Recovery Works fund to be used for other clients.

Client: Biscuit, Sea | M719078IB878100

Voucher

Group Enrollment: sknewG777
Plan: skNewForensic777
Voucher: 1275
Administering Agency: skForensicProvider3
Effective Date: 11/1/2015
End Date: 12/30/2015

Status: Active
Agreement: 22222 - skForensic777 / 11/2015 - 11/30/2018 - skNewForensic777-skinewG777
Date Approved: 12/10/2015
Updated Date: 12/10/2015 10:32 AM
Updated By: Canham, Patty
Stage: [dropdown]

Vouched Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available
skNewService7	90	\$900.00	\$150.00	\$750.00	\$150.00

Actions: [Close]

Summary:
Total Vouched: \$900.00
Total Encumbered: \$0.00
Total Expended: \$750.00
Total Available: \$150.00

Are you sure you want to Close this Authorization?
Yes No

Client: Biscuit, Sea | M719078IB878100

Voucher

Group Enrollment: sknewG777
Plan: skNewForensic777
Voucher: 1275
Administering Agency: skForensicProvider3
Effective Date: 11/1/2015
End Date: 12/11/2015

Status: Closed
Agreement: 22222 - skForensic777 / 11/2015 - 11/30/2018 - skNewForensic777-skinewG777
Date Approved: 12/10/2015
Updated Date: 12/11/2015 7:45 AM
Updated By: Canham, Patty
Stage: [dropdown]

Vouched Services List

Service	Authorized Units	Authorization Amt	Encumbered	Expended	Available
skNewService7	90	\$750.00	\$0.00	\$750.00	\$0.00

Actions: [Reopen]

Summary:
Total Vouched: \$750.00
Total Encumbered: \$0.00
Total Expended: \$750.00
Total Available: \$0.00

WITS ADMINISTRATIVE FUNCTIONS



Change Credentials (Password/Pin)

This screen allows you to change your password and pin as needed.

1. Click on the down arrow next to the User field on the WITS header. A Change Credentials box will appear – click on that.
2. The Change Password screen will appear. You will need to enter your current (Old) Password, then enter and confirm a new Password.
3. You will also need to enter your current (Old) Pin, then enter and confirm a new PIN and click Change.
4. You have the option of checking the Show Password/Pin field to enable you to see the new Password and Pin information as you key it. This was done to enable end users to better remember their passwords and PINs.
5. Clicking the Change button will save your password / pin changes

Note: Password and Pin are at least 6 characters long and include at least 1 number.

18.1.0

WITS IN-WITS QA

User: Canham, Patty Location: another gambling

Change Password

User Name: pcanham

Old Password

New Password

Confirm Password

Old Pin

New Pin

Confirm Pin

Change ☐ Show Password/Pin

Security Question is used if end user forgets their password at login. It is initially set the first time an end user logs into WITS.

Reviewing all Vouchers for Your Agency

1. To review all vouchers within the current Agency, you must first select the **Agency > Billing > Authorization List** link located in the Left side navigation.
2. Once you are in the **Voucher Search** screen, you may search using any of the available criteria or filters, or you may simply click the Go button to generate a list of all of the available vouchers within the Agency.
 - Easy to search by client First and Last name, UCN or authorization effective date
 - This screen also helps you to gain an understanding of the monies being spent for these services.
3. The browser window will reload and the voucher list will now appear on the screen with a list of available vouchers. To review any of the vouchers simply hover on the Actions pencil icon and click on the **View** link.
4. Click on the Export link to export the voucher list to an Excel spreadsheet, if needed.
5. Can also generate and print a voucher summary report, if you have the need to give a hard copy of the voucher to the client.


The screenshot shows the 'Voucher Search' and 'Voucher List' interface. Callout 1 points to the 'Authorization List' link in the left navigation menu. Callout 2 points to the search criteria fields. Callout 3 points to the 'View' link in the Actions column of the Voucher List table. Callout 4 points to the 'Go' button. Callout 5 points to the 'Generate Report' link in the top right corner.

Voucher Search

Provider Agency: Provider Facility:
 Administrative Agency: Contracting Agency:
 First Name: Last Name:
 Unique Client Number: Voucher#:
 Created on: Status:
 Authorization Effective Date: Payor Plan:
 Author: Created By:

Clear Go

Voucher List (Export)

Actions	#	Payor	Provider Agency	Admin Agency	Intake Facility	Client	Effective Date	End Date	Status	Vouched Amt	Encumbered	Expended	Available
 View	567	Recovery Works (Recovery 00667)	FTRW Agency	FTRW Agency		Dancer, Native	11/25/2015	12/25/2015	Active	\$20.00	\$0.00	\$0.00	\$20.00

Dollar Amount

Total Vouched: \$20.00
 Total Encumbered: \$0.00
 Total Expended: \$0.00
 Total Available: \$20.00

Voucher Summary Report generated by clicking on **Generate Report** link.

Care Coordinator: FTRW Agency

Date: 11/25/2015

Client Name: Dancer, Native

Client ID: M619577AD738100

Payor Plan: Recovery Works

Service Provider: FTRW Agency

Date Accepted: 11/25/2015

Agency Facility Name:

Voucher effective from: 11/25/2015 to 12/25/2015

Status: Active

Service: Doing Stuff here

Vouched Units: 4

Vouched Amount: \$20.00

Avail. Units: 4.00

Avail. Amount: \$20.00

Total Service Provider Voucher Amount: \$20.00

Available Funds Remaining: \$20.00

Total Client Amount of Vouchers: \$20.00

Total Funds Remaining: \$20.00

Care Coordinator Signature

Date

Client Signature

Date

Agency Review of Claims

Each agency may have a designated person who has accountability for reviewing encounters and releasing them to billing. The WITS Administrator will work with your agency to determine who has the Release to Billing role. The agency staff with the Release to Billing role should review the encounters every day to ensure they are being released to billing in a timely fashion. If encounters are not released to billing they will not get paid by the State.

To determine if there are encounters that are not released:

1. Go to the **Agency > Billing > Encounter List** link from the left navigation, you will be presented with the Encounter Search and Encounter List screen.
2. If you are looking for specific encounters – you can enter that encounter's criteria in the Encounter Search fields and click on the Go button to bring back those encounters that meet those criteria. Hitting the Clear button will clear all the Encounter Search criteria.
3. Review items returned in the Encounter List. You may also click on the (Export) link to export the information to a spreadsheet.
4. Any encounters that are in a status of **Not Released** are candidates to be released to billing (RTB).
5. Use the actions pencil icon to view the profile of the encounter
6. Click on the Release to Billing link in the Administrative Actions to release the encounter to billing.

The screenshot displays the WITS system interface. On the left is a navigation menu with a blue sidebar. The main content area is divided into two sections: 'Encounter Search' at the top and 'Encounter List (Export)' below it. The 'Encounter List' section contains a table with columns for Actions, Enc ID, Client Name, Sec Start, Status, Duration, Procedure, Rend. Staff, Program Name, and Balance. Below the table is a detailed view for a specific encounter (ENC 576), showing fields for Service, Program Name, Start Date, End Date, Start Time, End Time, Duration, # of Service Units/Sessions, and Rendering Staff. At the bottom, there is an 'Administrative Actions' section with a 'Release to Billing' link.

Actions	Enc ID	Client Name	Sec Start	Status	Duration	Procedure	Rend. Staff	Program Name	Balance
	574	Biscuit, Sea	11/6/2015	Released	300 Min	3070	Canham, Patty	Recovery Works	\$300.00
	575	Biscuit, Sea	7/1/1980	Released		3070	Canham, Patty	Recovery Works	\$150.00
	576	Biscuit, Sea	7/1/1980	Not Released		3070	Canham, Patty	Recovery Works	\$0.00
	577	Biscuit, Sea	7/1/1980	Not Released		3070	Canham, Patty	Recovery Works	\$0.00
	571	Dancer, Native	5/6/1960	Released		3070	Canham, Patty	Recovery Works	\$75.00

Client: Biscuit, Sea | M7190781B878100 | 1

ENC 576

Service: skNewService7

Program Name: Facility1/Recovery Works : 1/1/2015 -

Start Date: 11/18/2015, End Date: , Start Time: 9:00 AM, End Time: 12:00 PM

Duration: 180 Min, # of Service Units/Sessions: 15

Rendering Staff: Canham, Patty

Administrative Actions: [Release to Billing](#) [Delete](#)

Claim Batching/Submission/Adjudication

After encounters are released to billing a **claim item** is automatically created.

For INDIANA WITS, there are automated processes that run daily to automatically batch up the claims and on a weekly basis to bill the batched claims to the State. For Forensic Treatment / Recovery Works, there is also automated process to automatically adjudicate and mark the claim in WITS as paid.

The State then has processes outside of WITS to generate a check/EFT transaction to the provider for claims that are paid.

Late Friday night every week, WITS gathers all of the encounters that have been released to billing and creates a file. Monday-Wednesday, Recovery Works staff adjudicates that file and determines the verdict on any billings that were rejected or pended. On Wednesday at 4:00pm EST, all of the billings that were approved for payment in WITS are submitted and the State's WITS manager creates a file that can be read by the State payment, People Soft. That file is turned in to the Clerk's office for payment on Thursday, and they begin the payment process. Payments are made within 35 days of receipt of the file on Thursday. The process starts all over again the next day.

Claim Batch Processor takes all claims in a release status for a particular payer and loads them into a Claim Batch. To view batches :

1. From the left navigation go to **Agency > Billing > Claim Batch List**
2. You will be presented with the **Provider Claim Batch List** screen
3. You can enter search criteria such as Plan (Payor) Name or Created Date and click on the Go button to view Claim Batches that meet that criteria. Or click on the **Clear** button, then the **Go** button to see a list of all Claim Batches.
4. Notice at this point the status of the batch. A Batch Status of **'Billed'** means that the claims have been batched but not yet submitted to the State. A Batch Status of **'Accepted'** means that the Forensic Treatment \ Recovery Works batch has been accepted and paid by the State (indicates that the **Provider Claim Submission Processor** has run).
5. You can then use the Actions pencil icon to view all **Claim Items** in the batch or the **Profile** of the batch. Also have the ability to use the **(Export)** link in the Claim Item List section header to download the claims to a spreadsheet

The screenshot shows the 'Provider Claim Batch List' interface. On the left is a navigation menu with 'Agency' expanded and 'Claim Batch List' selected. The main area has search filters for Plan Name, Billing Form, Batch #, Created Date, and Status, with 'Clear' and 'Go' buttons. Below is a table of claim batches. A callout box shows 'Claim Items' and 'Profile' options for a specific batch. At the bottom is a 'Claim Item List for Batch 383 (Export)' table.

Actions	Batch #	Status	Batch For	Billing Form	837 Type	Order	Charges	Service Mo/Yr	Created	Transmit
	379	Accepted	skForensic777	WITS Batch		P	\$60.00		11/16/2015	
	383	Billed	skForensic777	WITS Batch		P	\$1,125.00		12/10/2015	

Actions	Claim #	Item #	Client Name	CPT	Status	Auth #	Cost Center	Charge
	558	710	Dancer, Native	3070	Batched	1274		\$75.00
	559	711	Dancer, Native	3070	Batched	1274		\$150.00
	560	713	Dancer, Native	3070	Batched	1274		\$150.00
	561	714	Biscuit, Sea	3070	Batched	1275		\$300.00
	562	715	Biscuit, Sea	3070	Batched	1275		\$150.00

Reviewing Payments

Once you see that a claim batch has been accepted in the claim batch list – you will want to review the payment information in WITS.

Claim Batch List (Export)										Download 837
Actions	Batch #	Status	Batch For	Billing Form	837 Type	Order	Charges	Service Mo/Yr	Created	Transmit
	379	Accepted	skForensic777	WITS Batch		P	\$60.00		11/16/2015	
	383	Accepted	skForensic777	WITS Batch		P	\$1,125.00		12/10/2015	

1. To begin, you must first click into the **Agency > Billing** module followed by the **Payment List** link located in the left side navigation.
2. You will be presented with the **Payment Search** screen, which will display any payments.
To generate a list, enter in your search criteria in the **Payment Search** section and click the **Go** button. Notice that the browser window will reload and the results list will appear in the **Payment List** section of the screen. Here you will be able to see all of the claim batches which have been released to billing and have been paid in WITS.
3. You never need to use the links outlined in red – WITS applies the payments from the State automatically.
4. Next, hover your cursor over the Actions pencil icon and click on the **Profile** link to view a payment profile item.

Payment Search

Payor Plan: First Name: Last Name:
 Pmt #: Posted Date: Reference:
 Payment Amount: Unapplied Amount:
 Contractor: Clear Go

Payment List (Export)

Actions	Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By
	213	skForensic Contractor2 - 22222	12/10/2015	\$1,125.00	\$0.00		User, System
	213	skForensic Contractor2 - 22222	11/16/2015	\$0.00	\$0.00		User, System
	209	skForensic Contractor2 - 22222	11/16/2015	\$60.00	\$0.00		User, System
Total Payment:				\$1,185.00			

Payment Profile

Payment # 213
 Agreement Name skForensic777
 Client Name
 Transaction Type Payment
 Reference 210
 Comment
 Intended For

Posted Date 12/10/2015
 Receipt Date 12/10/2015
 Created Date 12/10/2015 2:44 P
 Created By User, System
 Payment Amount \$1,125.00
 Unapplied Amount \$0.00
 Check/EFT Date

EOB Transaction Search

Administrative Actions: Show Payment Application Apply Paym

EOB Transaction Type Enc #
 First Name Last Name
 Payment # 213 Payor Name Clear Go Finish

EOB Transaction List (Export)

Actions	Enc #	Client Name	Svc Date	Svc Name	Rendering Staff	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name
	571	Dancer, Native	11/2/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	572	Dancer, Native	11/20/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	573	Dancer, Native	11/15/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	574	Biscuit, Sea	11/8/2015	skNewService7	Canham, Patty	Payment		\$300.00	12/10/2015	213	skForensic Contractor2 - 22222
	575	Biscuit, Sea	11/12/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	576	Biscuit, Sea	11/18/2015	skNewService7	Canham, Patty	Payment		\$225.00	12/10/2015	213	skForensic Contractor2 - 22222
	577	Biscuit, Sea	11/20/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222

5. If you click on the **Show Payment Application** Administrative Action, you will be taken to the

EOB List screen. This displays all the claims associated with this batch payment. Clicking on the **(Export)** link allows you to download the EOB transactions to a spreadsheet.

- In the **EOB Transaction Search** section, you can click on the **Clear** button, then click the **Go** button. This will cause all EOB transactions for all claim batches to appear. Notice how the Adjustment Reason is also listed.

EOB Transaction Search

EOB Transaction Type

First Name

Payment #

Enc #

Last Name

Payor Name

Clear
Go

6

EOB Transaction List (Export)

Actions	Enc #	Client Name	Svc Date	Svc Name	Rendering Staff	Transaction Type	Adjustment Reason	App Amt	App Date	Pmt #	Payor Name
	560	newtest7, sk7	11/16/2015	skNewService7	Kramperth, Scott	Payment		\$60.00	11/16/2015	209	skForensic Contractor2 - 22222
	560	newtest7, sk7	11/16/2015	skNewService7	Kramperth, Scott	Other adjustments	Exact duplicate claim/service (Use only with Group Code OA except where state workers' compensation regulations requires CO)	\$60.00	11/16/2015	210	skForensic Contractor2 - 22222
	571	Dancer, Native	11/2/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	574	Biscuit, Sea	11/8/2015	skNewService7	Canham, Patty	Payment		\$300.00	12/10/2015	213	skForensic Contractor2 - 22222
	575	Biscuit, Sea	11/12/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	573	Dancer, Native	11/15/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222
	576	Biscuit, Sea	11/18/2015	skNewService7	Canham, Patty	Payment		\$225.00	12/10/2015	213	skForensic Contractor2 - 22222
	577	Biscuit, Sea	11/20/2015	skNewService7	Canham, Patty	Payment		\$75.00	12/10/2015	213	skForensic Contractor2 - 22222
	572	Dancer, Native	11/20/2015	skNewService7	Canham, Patty	Payment		\$150.00	12/10/2015	213	skForensic Contractor2 - 22222

Another way to view payment information is by viewing the Billing Transactions.

1. To begin, you must first click into the **Agency > Billing** module followed by the **Billing Transaction List** link located in the left side navigation.
2. You will be presented with the **Billing Transaction Search** screen, which will display any payments.
To generate a list, enter in your search criteria in the **Billing Transaction Search** section and click the **Go** button. Notice that the browser window will reload and the results list will appear in the **Billing Transaction List** section of the screen. Here you will be able to see all of the payment information related to each individual claim/encounter (not the batch).
3. Notice that there are 2 lines for each claim/encounter – one with a type of **Charge** and one with a Type of **Payment Application**.
4. Clicking on the **Actions** pencil icon allows you to see the **Profile**, **Adjust** and **Billing History** links. The **Billing History** link is helpful in that it shows all billing actions that applied to the charge for the claim/encounter.

Billing Transaction Search

Encounter # Payment #
 First Name Last Name
 Service Start Posted Date
 Adjustment Reason Cost Center
 Transaction Type

Clear **Go**

Billing Transaction List (Export)

Actions	Enc.#	Svc Date	Client Name	Payer	Posted	Type	Charge	Credit	Pmt #
	571	11/2/2015	Dancer, Native		12/10/2015	Charge	\$75.00	\$0.00	
	571	11/2/2015	Dancer, Native	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$75.00	213
	574	11/8/2015	Biscuit, Sea		12/10/2015	Charge	\$300.00	\$0.00	
	574	11/8/2015	Biscuit, Sea	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$300.00	213
	575	11/12/2015	Biscuit, Sea		12/10/2015	Charge	\$150.00	\$0.00	
	575	11/12/2015	Biscuit, Sea	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$150.00	213
	573	11/15/2015	Dancer, Native		12/10/2015	Charge	\$150.00	\$0.00	
	573	11/15/2015	Dancer, Native	skForensicContractor2 - 22222	12/10/2015	Payment Application	\$0.00	\$150.00	213
	560	11/16/2015	new service7		11/16/2015	Charge	\$60.00	\$0.00	
	560	11/16/2015	new service7, sk7	skForensicContractor2 - 22222	11/16/2015	Payment Application	\$0.00	\$60.00	209

Profile **Adjust** **Billing History**

Billing History for Encounter # 571 - Dancer, Native (M569055AD656100)

Service skNewService7
 Service Start 11/2/2015 9:00 AM
 Service End 11/2/2015 10:00 AM
 Program Name Facility/Recovery Works : 1/1/2015 -

Encounter Balance: \$0.00
 Duration: 60 Min
 # of Sessions 5
 Rendering Staff Canham, Patty

Claim Item List

Id #	Plan Name	Order of Benefits	Charge	Claim Item Status	Created Date	Created By
710	skNewForensic777	Primary	\$75.00	Batched	12/10/2015	Canham, Patty

Billing Transaction List

Id #	Type/Source	Charge	Credit	Adjustment Reason	Comment	Created Date	Created By
894	Charge	\$75.00	\$0.00			12/10/2015	Canham, Patty
903	Payment Application - skForensicContractor2 - 22222 (Pymt # 213)	\$0.00	\$75.00			12/10/2015	User, System

Creating an Announcement

1. The Announcement List can be used to post or edit announcements on your home-page for select Agencies to view. To create an announcement, click on the **Announcements** menu item followed by the **Announcement List** link located in the left navigation.
2. Next, to add a new announcement click the **Add New Announcement** link.
3. You will now see the **Announcement** screen appear. Proceed and enter the required data in the fields specified.
4. Click on the **Finish** button when you have entered all of the appropriate information for the announcement. This will take you back to the list screen and where you will see the newly added announcement to the list.

User: Canham, Patty | Location: FTRW Agency, Facility 01 | Snapshot

Client: Dancer, Native | M619577AD738100 | 1 | Clear Client

Home Page

- ▼ Agency
 - ▼ Agency List
 - Agency Profile
 - Contacts
 - Relationships
 - Announcements
 - Referrals

Announcement List

Actions Summary

Sort Order	Priority
	H

Review Delete

Announcements

Summary

Send questions on the Forensic Treatment \ Recovery Works process to Shannon Burnett

If you are having an issue, please send a description of the issue, a screenshot, agency name and client UCN to Shannon Burnett

Details

The text of the announcement

Agency Type

Domains

ATR
Gambling - IN
SBIRT

Selected Domains

Forensic

Agency

Priority High

Start Date 11/25/2015

End Date 1/31/2016

Sort Order

Created By Canham, Patty

Created Date 11/25/2015 10:20 AM

Cancel Finish

5. To edit or delete the details of an announcement, click the **Review** link under Actions column.

Tip: Leaving the Agency Type drop down menu blank will display the message created for all of the agencies. High priority announcements will be displayed in red on the Home Page for users to see.

GLOSSARY



Indiana WITS is an internet based data collection and reporting system sponsored by the State of Indiana.

Top Navigation Bar: This area located at the top of the Indiana WITS screen and contains information that helps the user know his/her current context in the system.

The information includes:

1. **User** (the person currently logged in the system)
2. **Location** (the Agency and Facility currently selected)
3. **Client** (the client profile and data currently selected).

The screenshot displays the IN-WITS QA web application interface. At the top, a dark blue header bar contains the version number '18.1.0' on the left, the 'WITS IN-WITS QA' logo in the center, and a large blue circle with the number '2' on the right. Below the header, a light blue bar shows the user 'User: Canham, Patty' and the location 'Location: another gambling prov agecny, gam'. A large blue circle with the number '1' is positioned to the left of this bar. Below the user/location bar, a white bar displays the client information 'Client: Ager, Teen | M779975GA689100' and a 'Clear Client' button. A large blue circle with the number '3' is positioned to the left of this bar. On the left side of the interface is a blue sidebar menu. The menu items are: 'Home Page', 'Agency', 'Client List' (expanded), 'Client Profile' (expanded), 'Alternate Names', 'Additional Information', 'Contact Info', 'Collateral Contacts', 'Other Numbers', 'History', 'Client Group Enrollment', 'Voucher', 'Allergies', 'Linked Consents', 'Activity List', 'Episode List', 'System Administration', 'Reports', and 'Support Ticket'. The main content area is titled 'Profile' and contains a form for client data. The form fields are: 'First Name' (Teen), 'Middle Name' (empty), 'Last Name' (Ager), 'Mother's Maiden Name' (empty), 'Suffix' (empty), 'Gender' (Male), 'DOB' (7/7/1999), 'SSN' (203-92-8765), 'DARMHA Client ID' (empty), 'Unique Client Number' (M779975GA689100), 'State Client ID' (empty), 'Record Created By' (Conrad, Jennifer), 'Last Updated By' (User, System), 'Created Date' (7/8/2015 5:50 PM), 'Last Updated Date' (10/8/2015 4:37 PM), 'Driver's License' (empty), 'Medicaid #' (empty), and 'Has paper file' (Yes). At the bottom of the form is an 'Administrative Actions' section with 'Cancel', 'Save', 'Finish', and a 'Next' button.

4. **Left Navigation:** WITS has been intelligently designed to follow common behavioral health treatment and recovery service work flows. As a result, when using the left navigation, you will immediately note that most of the modules and screens have been logically organized in a manner which makes sense to clinical staff, case managers and administrators.
5. **Navigating:** Users can easily select where they want to start working by clicking into any of the key modules and screens for instant access. Selections on the Left Navigation will have the font change from white to black.

18.1.0

IN-WITS QA

User: Canham, Patty ▾ | Location: another gambling prov agecny, gam ✎

4

5

- Home Page
- Agency
- ▼ Client List
 - ▼ Client Profile
 - Alternate Names
 - Additional Information
 - Contact Info
 - Collateral Contacts
 - Other Numbers
 - History
 - Client Group Enrollment
 - Voucher
 - Allergies
 - Linked Consents
 - Activity List
 - Episode List
- System Administration
- Reports
- Support Ticket

Client: Ager, Teen | M779975GA689100 ✕ Clear Client

Profile

First Name

Middle Name

Last Name

Mother's Maiden Name

Suffix

Gender

DOB

SSN

Driver's License

Medicaid #

Has paper file

DARMHA Client ID

Unique Client Number

State Client ID

Record Created By

Last Updated By

Created Date

Last Updated Date

[Zip Code](#)

Administrative Actions

Cancel
Save
Finish
▶▶

6. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. It is also the area which will display system and client information, as well as allow you to enter data.
7. **Section Headers:** WITS often contains screens which are comprised of several sections. Therefore, to make it easy to navigate the page, section headers have been provided for clear identification.
8. **Function Links:** If the screen you are in allows you to perform certain functions, such as adding a client, reviewing data, exporting data etc., the functions will usually appear in the section headers as white underlined links.
9. **Action Buttons:** As you enter data and navigate between screens, you will be given various options such as Save, Clear, Cancel, Go, and Finish, all indicated by easy to view buttons.

Client: Ager, Teen | M779975GA689100 [Clear Client](#)

7

6

9

8

7

8

7

Profile

First Name: Teen
Middle Name:
Last Name: Ager
Mother's Maiden Name:
Suffix:
Gender: Male
DOB: 7/7/1999
SSN: 203-92-8765
Driver's License:
Medicaid #:
Has paper file: Yes

DARMHA Client ID:
Unique Client Number: M779975GA689100
State Client ID:
Record Created By: Conrad, Jennifer
Last Updated By: User, System
Created Date: 7/8/2015 5:50 PM
Last Updated Date: 10/8/2015 4:37 PM
Zip Code:

Administrative Actions

Cancel

Save

Finish

▶

Alternate Names

Actions	Last Name	First Name	Middle Name	Client Alias Type

Add

Addresses

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 baltimore, IN 98172	No	7/8/2015	7/8/2015

Add

10. Input Fields/Selection Boxes: The main content area is the location where the user will enter data into fields, selection boxes, drop-down lists etc. Keep in mind that some fields may be required by your WITS application and will be indicated as such by a Dark Yellow color.

11. Lists: When arriving at a screen, users will most likely first see data and information presented as lists. These lists will display available information in columns of different data types which will correspond to the Client, Agency, Facility, Staff, etc., currently selected. In addition, some lists may have an “Action” column offering functions which can be applied to a selection from the list.

Home Page
Agency
Client List
Client Profile
Linked Consents
Activity List
Episode List
System Administration
Reports
Support Ticket

The filter you created has been applied to the client list.

Client Search

Agency: another gambling prov agency
First Name
SSN
IN-WITS QA Client Id
Unique Client Number
Treatment Staff
Case Status: All Clients
Other Number
Include Only Active Consents: Yes





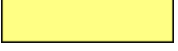
Facility
Last Name
DOB
Provider Client ID
Primary Care Staff
Intake Staff
Number Type

Clear Go





Client List (Export) Add Client

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	M65922221587100	1, phase 2 test	6/5/1972	323-55-8252	Male
	U11915054249100	4520, M	1/1/1991	333-22-4520	Not Known
	M11915655359101	5536, M	1/1/1991	333-82-5536	Male
	M38924056127100	6522, client	3/8/1972	325-63-2410	Male
	M11915557079101	7505, M	11/1/1991	333-22-7505	Male
	M779975GA689100	Ager, Teen	7/7/1999	203-92-8765	Male

Data Field Conventions:

	Mandatory field, MUST have data in order to save record
	Read Only, system generated field, for display only & cannot be edited
	Discretionary field, will not affect completion or saving of record
	Required missing field, enter data before trying to Save or Finish
	Required for State Reporting; record may be saved but will not be complete if these are empty

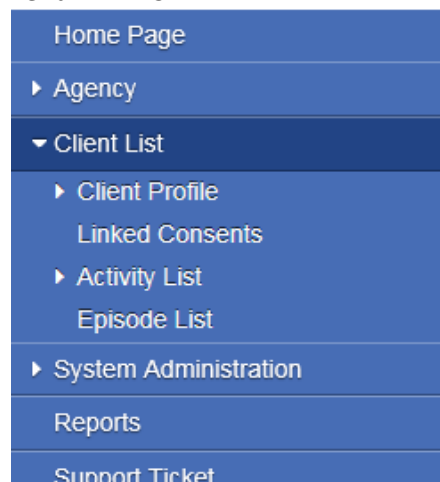
System Icons:

	Required fields are missing data, the record cannot be updated until data is entered.
	Warning, data has been entered which falls outside of a certain parameter. The record can be updated but you have been warned.
	This application is designed for Microsoft Internet Explorer version 10.0 or higher. Make sure all Windows patches and updates are applied.
	System generated Informational messages usually informing you of a pending task or event needing attention.












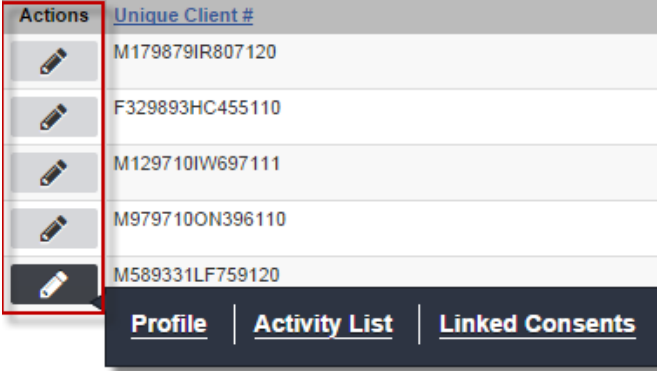
Site Navigation:

Client List > Client Profile

The above convention is used throughout this document to show the Navigation path needed to access the module. Each > indicates a level down from the previous in the left Navigation menu. Below is a screen shot of the left Navigation menu in WITS.



Actions:

	Cancels the current action and returns you to the previous page.
	Saves data entered and remains on the current page.
	Saves data entered and returns you to the section start page.
	Navigate through the pages\screens in each section.
	Clears all criteria from the search tools when present.
	Run the search tool using the criteria entered.
 	<p>A blue line under a field means you can do something with that field.</p> <ul style="list-style-type: none"> Column headings – can click the column heading to sort the table alphanumerically from 1-Z and then Z-1. Administrative actions – can click on the administrative action to initiate that page \ screen.
 	Move data from one choice box to another.
 	On list screens, can hover over an Actions pencil icon that will allow you to navigate quickly to screens associated to items in that list.

